

Age: 14		<p align="center"><u>Please see petition for details</u></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p align="center"><b><u>OFF CALENDAR</u></b></p> <p>Amended Petition filed 4/16/15 is set for 5/28/15.</p> <p>Minute Order of 03/30/2015: Continued due to notice issue.</p> <p>The following issues remain:</p> <ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Termination of Guardianship or consent and waiver of notice or declaration of due diligence for:             <ul style="list-style-type: none"> <li>• Pam Esmael (Maternal Grandmother)</li> </ul> </li> </ol>	
Cont. from 033015				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			n/a
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
		<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 04/15/2015</p> <p><b>Updates:</b> 04/17/15 (skc)</p> <p><b>Recommendation:</b></p> <p><b>File 1 – Purkey</b></p>		

**Order to Show Cause: Regarding Failure to File the Inventory and Appraisal  
and for Failure to File a First Account or Petition for Final Distribution**

		<p><b>LEON Y. GEORGE</b>, father, and <b>ARMEN L. GEORGE</b>, brother, were appointed as Co-Administrators with Full IAEA without bond and Letters issued on 1-25-05.</p> <p>Leon Y. George is a resident of Fresno, CA. Armen L. George is a resident of Sammamish, WA.</p> <p>The original petition alleged \$200,000.00 in personal property, annual income from personal property of \$5,000.00, and real property valued at \$150,000.00. However, no Inventory and Appraisal was ever filed pursuant to Probate Code §8800.</p> <p>Three Creditor's Claims have been filed totaling \$28,426.95, and a Request for Special Notice was filed by the State of California Franchise Tax Board on 11-6-06.</p> <p>No accounting or petition for final distribution was ever filed pursuant to Probate Code §12200.</p> <p>Minute Order of 03/09/2015 set this OSC. Minute Order states: No appearance – The Court issues an Order to Show Cause to Jeffrey Simonian, Leon George, and Armen George as to why the Co-Administrators should not be removed for failure to appear and failure to file the Inventory and Appraisal. Each are order to be personally present in court or to appear via Court Call on 04/20/2015.</p> <p>Clerk's Certificate of Mailing and Minute Order sent to Attorney Jeffrey Simonian, Leon George and Armen George on 03/09/2015.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need Inventory and Appraisal.</li> <li>2. Need First Account or Petition for Final Distribution.</li> </ol>
<b>Cont. from</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 04/15/2015</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 2 - George</b></p>	

Pro Per Gonzalez, Adam (Pro Per Petitioner, father)

Atty Vezzola, Mark A.; Radoff, Mark A., of Escondido, CA (for Tohono O'odham Nation)

## Petition for Termination of Guardianship

		ADAM GONZALEZ, father, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b> <b>Page 3B</b> is the related <i>Petition for Appointment of Guardian of JASMINE GONZALEZ</i> (sibling of Adam and Makayla Gonzalez) filed by Miroslava Ibarra, maternal grandmother. <b>Continued from 3/18/2015.</b> Minute Order states the Court wants the legal authority that requires the Court to pay for the copy of the file requested by the Tohono O'odham Nation. Mr. Vezzola is to file his Memorandum of Points and Authorities no later than 4/8/2015. Continued to 4/20/2015 to meet up with the petition for Jasmine Gonzalez. <b>Note:</b> Court records show points and authorities has not been filed as of 4/15/2015. <b>The following defects from the last hearing remain:</b> <ol style="list-style-type: none"> <li>Order on Court Fee Waiver filed on 12/5/2014 shows Petitioner's fee waiver request was denied. Therefore, Petitioner owes the <b>\$60.00</b> filing fee for the petition for termination, which Court records indicate has not been paid to date, and Petitioner does not appear to have requested reconsideration of the fee waiver order.</li> <li>Need Notice of Hearing and proof of service by mail of the Notice of Hearing with a copy of the <i>Petition for Termination of Guardianship</i>, or <i>Consent to Termination and Waiver of Notice</i> for: <ul style="list-style-type: none"> <li>Evelyn D. Chavez, mother;</li> <li>Adam Gonzalez, Ward;</li> <li>paternal grandfather;</li> <li>Miroslava Ibarra, maternal grandmother;</li> <li><b>TOHONO O'ODHAM INDIAN NATION</b>, the ICWA Tribe of the wards identified in the initial <i>Petition for Guardianship</i> filed 10/12/2005. (<b>Note: Please see Additional Page for Notice of Intervention.</b>)</li> </ul> </li> </ol>
		ALFRED CHAVEZ, maternal grandfather, was appointed Guardian on 4/17/2006.	
Cont. from 020415, 031815		Guardian Alfred Chavez was personally served on 1/6/2015.	
<input type="checkbox"/>	Aff.Sub.Wit.	~Please see Petition for details~	
<input checked="" type="checkbox"/>	Verified	Court Investigator's Report was filed 1/27/2015.	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail	X Court Investigator's Report was filed on 4/8/2015.	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.	Declaration in Opposition to Termination of Guardianship filed by ALFRED CHAVEZ, Guardian, on 2/2/2015.	
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input checked="" type="checkbox"/>	Objections	Tohono O'Odham Nation's Notice of Intervention; Discovery & Disclosure Request; Memorandum of Points & Authorities filed 3/13/2015 requests that the Court provide the Tribe's counsel with copies of all reports and other documents which may be the basis for any decision with respect to the [Petition for Termination].	
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	Clearances		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: LEG
Reviewed on: 4/15/15
Updates:
Recommendation:
File 3A - Gonzalez

**3B Jasmine Gonzalez (Guard/P)****Case No. 05CEPR00675**

Pro Per Ibarra, Miroslava (Pro Per Petitioner, maternal grandmother)

Pro Per Gonzalez, Adam (Pro Per Objector, father)

Atty Vezzola, Mark A.; Radoff, Mark A., of Escondido, CA (for Tohono O'odham Nation)

**Petition for Appointment of Guardian of the Person**

		<b>MIROSLAVA (MARI) IBARRA</b> , maternal grandmother, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Page 3A</b> is the related matter of the <i>Petition for Termination of Guardianship</i> of this child's siblings, who have been under Guardianship with <b>ALFRED CHAVEZ</b> , maternal grandfather, having been appointed Guardian on 4/17/2006.  <b>Note:</b> Minute Order dated 2/18/2015 from the hearing on the temporary petition states the temporary petition is not granted today. The Court orders that the minor is to visit with Miroslava Ibarra, grandmother, every weekend from Friday at 5 p.m. through Sunday at 5 p.m. Ms. Ibarra is to pick the minor up at the start time and Mr. Gonzalez is to pick the minor up at the ending time. The Court also orders that the minor may call to speak with Ms. Ibarra and the minor's siblings daily from 4 p.m. to 5 p.m. Furthermore, no party is to discuss this matter with or in front of the minor, or make any disparaging remarks about each other to or in front of the minor.  1. Need proof of <u>personal</u> service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian</i> , or <i>Consent to Appointment of Guardian</i> and <i>Waiver of Notice</i> , or a <i>Declaration of Due Diligence</i> , for: <ul style="list-style-type: none"> <li>Evelyn Chavez mother.</li> </ul> <b>~Please see additional page~</b>
		Father: <b>ADAM GONZALEZ</b> ; personally served 2/15/2015.	
		Mother: <b>EVELYN CHAVEZ</b> ; served by mail.	
		<b>~Please see Petition for details~</b>	
		<b>Court Investigator's Report</b> was filed on 4/8/2015.	
<b>Cont. from</b>			
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>	W / O	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
✓	<b>Pers.Serv.</b>	W / O	
✓	<b>Conf. Screen</b>		
✓	<b>Letters</b>		
✓	<b>Duties/S</b>		
✓	<b>Objections</b>	W / P OS	
	<b>Video Receipt</b>		
✓	<b>CI Report</b>		
✓	<b>Clearances</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
✓	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
		<b>Reviewed by:</b> LEG	
		<b>Reviewed on:</b> 4/15/15	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 3B - Gonzalez</b>	

**NEEDS/PROBLEMS/COMMENTS, continued:**

2. Need proof of service by mail of the *Notice of Hearing* with a copy of the *Petition for Appointment of Guardian*, or *Consent to Appointment of Guardian and Waiver of Notice*, or a *Declaration of Due Diligence*, for:
  - paternal grandfather (*Personal service shows Chevy Gonzalez was served 2/15/15, indicating "Adam's dad"*);
  - Adam Gonzalez, sibling (age 13).
  - Makayla Gonzalez, sibling (age 12).
3. Need *Guardianship Petition – Child Information Attachment* for Jasmine Gonzalez to be filed with the Court.

***Objection to Guardianship* filed by Adam Gonzalez, father, on 2/17/15.**

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Continued from 3-23-15. All relatives have now been served.
Cont from 032315			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 3-18-15	
		Updates:	
		Recommendation:	
		File 4 - Hale	

<b>William</b> <b>DOD: 2/2/09</b>	<b>ROSS WILKINSON</b> , Respondent, moves the Court for an Order to Show Cause requiring Petitioner <b>JAMES WILKINSON</b> to show cause why an order should not be entered as follows: <ul style="list-style-type: none"> <li>• Striking December 22, 2014 Amended Judgment</li> <li>• Striking/Denying claimed taxable costs and attorneys fees</li> <li>• Determining appropriate taxable costs</li> <li>• Establishing protocols to allow for payment and satisfaction of judgment</li> <li>• Striking application of interest on portion of judgment</li> <li>• Requiring trust termination pursuant to court order</li> <li>• Allocating trust attorney fees since decision to Petitioner at trust termination</li> <li>• Applying Respondent's trust termination distribution in reduction of judgment</li> <li>• Providing for a hearing without oral argument</li> <li>• Providing for service of process by mail directed to Petitioner's attorney</li> </ul> <p><b>Declaration of Ross Wilkinson and Objection to Cost Bill and Computation of Judgment Balance</b> states he really wants to satisfy this judgment, have the trust terminated and get this whole matter behind him. He is requesting the court's help in this process as Mr. Clark only acts to prolong this proceeding charging tens of thousands of dollars in attorneys fees in the process. Movant does not believe it is possible to satisfy the judgment without a structure being created by the court. The judgment balance would always be a moving target. Terminating the trust should be accomplished at this time. It should be easy as there are really no assets – only a bank account. Movant has no problem with his brother paying tens of thousands of dollars in legal fees to Mr. Clark out of his share, but he needs his share to reduce the original judgment.</p> <p><b>Supplemental Declaration</b> states his Washington lawyer tried to arrange for payment in this case in Snohomish County, WA, where the current collection action is taking place. The Snohomish County Superior Court Judge hearing the case determined that the California Court must resolve the judgment issues but ordered a stay of execution while this process happens (attached).</p> <p><b>Opposition was filed 4/6/15 by William Clark, attorney for James Wilkinson. See Page 2.</b></p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <p><u><b>Note:</b></u> This motion was filed by Ross Wilkinson, in proper; however, Mr. Wilkinson's attorney of record for this matter is Jeffrey D. Simonian.</p> <p><u><b>Note:</b></u> No Notice of Hearing was filed or served pursuant to Probate Code. Certificate of Service filed 3/27/15 indicates service on 3/4/15 on Attorney Clark only and not on Petitioner James Wilkinson directly pursuant to Cal Rules of Court 7.51.</p> <p><u><b>Note:</b></u> A proposed original Order to Show Cause was provided by Movant. No copies to conform were provided.</p>
<b>Dorothea</b> <b>DOD: 1/19/97</b>		
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	
<input type="checkbox"/>	<b>Inventory</b>	
<input type="checkbox"/>	<b>PTC</b>	
<input type="checkbox"/>	<b>Not.Cred.</b>	
<input type="checkbox"/>	<b>Notice of Hrg</b>	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	
<input type="checkbox"/>	<b>Aff.Pub.</b>	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	
<input type="checkbox"/>	<b>Pers.Serv.</b>	
<input type="checkbox"/>	<b>Conf. Screen</b>	
<input type="checkbox"/>	<b>Letters</b>	
<input type="checkbox"/>	<b>Duties/Supp</b>	
<input type="checkbox"/>	<b>Objections</b>	
<input type="checkbox"/>	<b>Video Receipt</b>	
<input type="checkbox"/>	<b>CI Report</b>	
<input type="checkbox"/>	<b>9202</b>	
<input checked="" type="checkbox"/>	<b>Order</b>	
<input type="checkbox"/>	<b>Aff. Posting</b>	
<input type="checkbox"/>	<b>Status Rpt</b>	
<input type="checkbox"/>	<b>UCCJEA</b>	
<input type="checkbox"/>	<b>Citation</b>	
<input type="checkbox"/>	<b>FTB Notice</b>	

## Page 2

**Opposition filed 4/6/15 by William Clark, attorney for James Wilkinson, states** after a lengthy trial on this matter before Judge M. Bruce Smith, the Court rendered a judgment in favor of Petitioner James Wilkinson against Respondent Ross Wilkinson and awarded James \$595,284.28 in damages as well as an award of attorney fees and costs. On 12/11/13, Judge M. Bruce Smith granted Petitioner's Motion for Attorney Fees and Costs in the amount of \$286,527.14, which motion was opposed by Respondent's attorneys. Petitioner pursued his rights to collect on said judgment and took necessary procedural steps including proper recording of the judgment with a sister state judgment in the State of Washington where Respondent resides. Petitioner retained Washington counsel and pursued collection. Respondent retained counsel as well to stop collection efforts.

Approx. one year after the Court granted the Motion for Attorney Fees and Costs, Petitioner filed a **Memorandum of Costs After Judgment, Acknowledgment of Credit, and Declaration of Accrued Interest**, which was served on Respondent and his Washington counsel, Thomas Bigsby, on 10/29/14. On 12/19/14, Petitioner submitted an **Ex Parte Application for Amended Judgment** for Costs. The request of \$22,193.63 represented costs and expenses incurred in collection efforts on the judgment. Petitioner acknowledged partial credit and payment of \$150,000.00. The original **Ruling and Order on Petitioner's Motion for Attorney Fees & Costs** was stamped on 12/9/14 with the costs added to the original judgment and initialed by the Court Clerk. Petitioner submitted said **Amended Judgment** on 12/22/14. Upon receipt, Petitioner sent a **Notice of Entry of Amended Judgment** to Respondent and Mr. Bigsby. See attached.

Respondent has improperly brought this alleged Post-Judgment Motion for Order to Show Cause, contrary to California Civil Procedure and law. This is merely a shot in the dark filing requesting numerous remedies and modifications to the Amended Judgment which was properly entered and recorded. Respondent has not complied with California law and this motion should be denied in its entirety.

See Opposition and Declaration in Support of Opposition for further discussion.



# 6 The Aidan O'Connor Special Needs Trust

Case No. 11CEPR01097

Attorney Matlak, Steven M. (for Bruce Bickel – Trustee/Petitioner)

## Petition for Settlement of Second Account Current and Report of Trustee: and for Approval of Attorney's Fees and Costs

Age: 11 years		BRUCE D. BICKEL, Trustee of the AIDAN O'CONNOR SPECIAL NEEDS TRUST established 3/20/2012, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 01/16/13 – 12/31/14	<p><b>Note:</b> The order establishing the Special Needs Trust dated 03/20/12 authorized the Trustee to receive payments of fees each month at the rate of \$150/hr. but not to exceed \$1,000.00 in any given month. Reimbursement of any excess fees over \$1,000.00 in any given month requires approval of the court. At this time, there is no excess requested from Petitioner. Total trustee fees paid during the account period were \$11,337.93.</p>
Cont. from		Accounting - \$269,670.59	
	Aff.Sub.Wit.	Beginning POH - \$216,161.89	
✓	Verified	Ending POH - \$247,065.38	
	Inventory	Trustee - not requested (see note)	
	PTC	Attorney - \$4,086.50 (per Declaration filed 03/03/15, itemized on Exhibit B, for 24.8 hours @ attorney/paralegal rates from \$260 to \$130/hr.; includes \$200 costs)	
	Not.Cred.	Petitioner indicates that Bond is currently posted in the amount of \$271,110.69. Petitioner states that the current bond amount is insufficient and proposes that bond be increased to \$325,682.61.	
✓	Notice of Hrg	Petitioner prays for an Order:	
✓	Aff.Mail w/	1. Approving, allowing and settling the Second Account Current and Report of Trustee, and ratifying, approving and confirming all acts and transactions of the Petitioner as Trustee as set forth in the Petition;	
	Aff.Pub.	2. Directing Trustee to file an additional bond in the amount of \$49,571.92, bringing the total bond posted to \$325,682.61; and	
	Sp.Ntc.	3. Authorizing the attorney's fees and reimbursement of costs.	
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: JF
			Reviewed on: 04/16/15
			Updates:
			Recommendation:
			File 6 – O'Connor

Attorney Kruthers, Heather H (for Petitioner Public Guardian)

Attorney Standard, Donna M (for Conservatee)

**Petition for Court Authorization to Sell Real Property (Former Residence) and Personal Property of the Estate**

			<b>PUBLIC GUARDIAN</b> , Conservator, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
			<b>Petitioner states</b> the conservatorship estate includes real property located in Squaw Valley that was the former residence of the conservatee.	
<b>Cont. from</b>			The conservatee has been residing at Marion Home I (now Mary's Manor) since 2/24/12. It is doubtful he will return to independent living. There are expenses involved with retaining the property, and it would be to his benefit to sell it.	
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>		Petitioner requests the Court authorize the sale of Conservatee's personal residence and any personal property she no longer needs, so that the proceeds could be utilized to pay for her cost of care.	
	<b>Inventory</b>			
	<b>PTC</b>		<b>Declaration of Deputy Public Guardian</b> <b>Renee Garcia</b> states that she spoke with the Conservatee and that Conservatee agreed and said that it seemed like a good idea. He then said he would be leaving the facility soon. When asked where he would go he said, "my place in Squaw Valley."	
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>		<b>Petitioner prays</b> for an order authorizing petitioner to sell Conservatee's real property, upon confirmation of the court, and any personal property that is no longer needed by the conservatee. Petitioner also prays to retain the services of a licensed real estate broker to assist in the sale.	
✓	<b>Aff.Mail</b>	W/		
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			

Reviewed by: KT

Reviewed on: 4/15/15

Updates:

Recommendation:

File 7 - Sager

Atty Amador, Catherine A (for former Conservators of the estate and current conservators of the person Manuel Chavez and Susan Chavez-Leon)

Atty Kruthers, Heather (for current Conservator of the estate, Public Guardian)

Fifth Amended First Account and Report of Conservators; Petition for Allowance of Fees to Attorney for Conservators

		<b>MANUEL CHAVEZ</b> , father, and <b>SUSAN CHAVEZ-LEON</b> , sister, Co-Conservators of the Person and Estate, are Petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>Account period: 11/26/12 - 11/30/13</b>	<p><b>Note:</b> Manual Chavez and Susan Chavez-Leon were removed as Co-Conservators of the Estate and the Public Guardian appointed by minute order dated 12/11/15.</p> <p><b>Declaration of Catherine Amador filed on 4/9/15 potentially correcting issues in the accounting. The declaration requires the examiner to look between two documents to attempt to make sense of the accounting. Need sixth amended accounting so that all information is in one complete document.</b></p> <p>1. Bank account #XXX0433 is a "joint account" the names of Manuel Chavez and Susan Chavez Leon and not the conservatorship. California Rules of Court, Rule 7.1059(b)(6) states the conservator of the estate must keep the money and property of the estate separate from the conservator's or any other persons money or property.</p>
Cont. from 031615, 031615		Accounting - <b>\$321,923.66</b>	
	Aff.Sub.Wit.	Beginning POH - <b>\$238,464.60</b>	
✓	Verified	Ending POH - <b>\$237,282.98</b> (\$15,282.98 is cash)	
	Inventory	Conservator - <b>not requested</b>	
	PTC	Attorney - <b>\$6,625.00</b> (per declaration and itemization, for 25.00 hours (reduced from 36.90 hours) @ \$265.00 per hour;)	
	Not.Cred.	Costs - <b>\$1,035.00</b> (filing fees, process service fee; certified copies)	
✓	Notice of Hrg	Bond - <b>\$324,640.00</b> (sufficient)	
✓	Aff.Mail W/	<b>Petitioner prays for an order:</b>	
	Aff.Pub.	1. Approving, allowing, and settling the [First] Account and acts of Co-Conservators; and	
	Sp.Ntc.	2. Authorizing the Attorney fees and costs advanced to the Conservatorship during the accounting period; and	
	Pers.Serv.	3. Finding that the Conservatee is not able to complete an affidavit of voter registration and is not entitled to vote.	
	Conf. Screen	<b>Court Investigator Report filed 9/8/2014</b>	
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	2620		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<b>Reviewed by: KT</b>
			<b>Reviewed on: 4/15/15</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 8 - Chavez</b>

2. Most of the deposits listed in the Receipt schedule do not include the source of the funds as required.
3. Most of the disbursements do not include the nature and purpose of the disbursement as required.
4. There are several disbursement listed with just a question mark (?) that do not state what they are for, including one disbursement on 9/17/13 for \$2,000.00 listed as "cash"
5. Petition asks for attorney fees totaling **\$6,625.00**. Attorney fees appear to include duplication of work by the attorney and the paralegal. For instance billing statement includes time for the attorney to prepare all the pleadings and also for the paralegal to prepare all the pleadings. The billing statement includes .30 hours (\$79.50) for the attorney to prepare the Duties of Conservator. In addition the billing statement also includes paralegal time of .20 (\$5.00) to prepare the same form. The only thing that needs to be prepared on the Duties of Conservator form is the case name and case number. The billing statement also includes time to prepare a Petition for Exclusive Authority to Give Medical Treatment that was filed at the same time as the Petition for Appointment of Conservator. This was an unnecessary petition in that the request can be made in Petition for Appointment of Conservator. The fees also include time for the preparation of the first amended petition.
6. Need proof of service of the Notice of Hearing for the Fifth Amended Account on the current Conservator, Public Guardian.

(1) First and Final Account and Report of Personal Representative, (2) Petition for Settlement, for (3) Allowance of Attorneys' Fees for Ordinary Services, Costs, and for (4) Final Distribution

<b>DOD: 4/14/12</b>		<b>SANTOS PEREZ</b> , Administrator, is petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>Current bond: \$78,000.00</b>		<p><b>Continued from 2/23/15. Minute order states Counsel represents that funds have not been received by the County yet. Items one and two of the examiner notes are to be cured; the Court is not inclined to approve the distribution as has been requested.</b></p> <ol style="list-style-type: none"> <li>Petition proposes to distribute the 1997 Automobile to Petitioner. Petitioner is not an heir to this estate. Therefore the property should be distributed to the heirs.</li> <li>Petition proposes to distribute the real property subject to a life estate in favor of the petitioner, who is not an heir to this estate. Two of the beneficiaries, Mike Chavez and Richard Flores, Jr. have signed a Renunciation in favor of Petitioner for a life estate in the real property. The other two beneficiaries Isabel Alvarez and Sylvia Alaniz have not agreed the property being distributed subject to a life estate.</li> </ol> <p><b>Please see additional page</b></p>	
		Account period: 4/14/12 – 8/21/14			
<b>Cont. from 111014, 011215, 022315</b>		Accounting - <b>\$96,400.00</b>			
	<b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$96,400.00</b>			
✓	<b>Verified</b>	Ending POH - <b>\$96,400.00</b>			
✓	<b>Inventory</b>	Administrator - <b>waives</b>			
✓	<b>PTC</b>	Attorney (statutory) - <b>\$3,856.00</b>			
✓	<b>Not.Cred.</b>	Costs - <b>\$1,724.70</b> (filing fees, publication, probate referee, bond, recorder fees and certified copies)			
✓	<b>Notice of Hrg</b>	Creditor: Department of Health Care Services - <b>\$30,826.13</b>			
✓	<b>Aff.Mail</b>	W/			
	<b>Aff.Pub.</b>	<b>Petitioner states</b> he and the decedent lived together in the estate real property since 1987 until decedent's death in 2012. During the time that petitioner resided with decedent on the real property, he paid the mortgage payments each month, the maintenance and upkeep, and the annual property taxes. The decedent and petitioner agreed that petitioner would have a life estate in the property. Petitioner has continued to pay said expenses since the date of death of the decedent. Mike Chavez and Richard Flores, Jr. children of the decedent, executed a Renunciation in Favor of Santos Perez for a Life Estate; Isabel Alvarez and Sylvia Alaniz, daughters of the decedent did not execute such Renunciation.			
	<b>Sp.Ntc.</b>				
	<b>Pers.Serv.</b>				
	<b>Conf. Screen</b>				
✓	<b>Letters</b>	6/18/13			
	<b>Duties/Supp</b>				
	<b>Objections</b>				
	<b>Video Receipt</b>				
	<b>CI Report</b>				
✓	<b>9202</b>				
✓	<b>Order</b>				
	<b>Aff. Posting</b>				
	<b>Status Rpt</b>				
	<b>UCCJEA</b>				
	<b>Citation</b>				
✓	<b>FTB Notice</b>				
		<b>Please see additional page.</b>			
				<b>Reviewed by: KT</b>	
				<b>Reviewed on: 4/15/15</b>	
				<b>Updates:</b>	
				<b>Recommendation:</b>	
				<b>File 9 – Gonzalez</b>	

Petitioner seeks to distribution of a life estate in the real property under the principle of estoppel. The real property will be subject to a lien in favor of the of the Department of Health Care Services of the State of California until the death of Santos Perez, or the sale of the real property, and subject to the lien of Quinlan, Kershaw and Fanucchi, LLP for attorneys' fees and costs with interest at 10% per annum from the date of the order. In addition the property would be distributed subject to a lien in favor of the Department of Health Care Services in the amount of \$30,826.13 with interest accruing at 7% per annum from the date of recording of the Order and subject to a lien in favor of Quinlan, Kershaw and Fanucchi, LLP, for attorney fees and reimbursement of costs of administration.

**Proposed distribution is to:**

Santos Perez	-	1997 Chevy Automobile and a life estate in the real property
Mike Chavez (son)	-	1/4 <sup>th</sup> Interest in the real property, subject to the life estate.
Isabel Alvarez (daughter)	-	1/4 <sup>th</sup> Interest in the real property, subject to the life estate.
Richard Flores, Jr. (son)	-	1/4 <sup>th</sup> Interest in the real property, subject to the life estate.
Sylvia Alaniz (daughter)	-	1/4 <sup>th</sup> Interest in the real property, subject to the life estate.

**Declaration of paralegal Charlene Bullock filed on 3/2/15** states on 1/13/15 she had a voice mail message from Bobbie Coleman of the Recovery Section of the Department of Health Care Services. Mr. Coleman advised that the Department had reviewed the First and Final Account, the Order for Final Distribution, and the lien set forth in said document was acceptable to the Department. Ms. Bullock states that her office has filed Orders for Final Distribution in other probate matters wherein a lien to the Department of Health Care Services is set forth therein, and the Department has accepted those orders each time without having filed a formal consent or letter of consent with the Court.

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## Petition for Termination of Guardianship

		JENNIFER HOWELL, mother, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Page 10B</b> is the <i>Petition to Fix Residence Outside the State of California</i> filed by Co-Guardians Martin Moore and Amber Moore.
		MARTIN E. MOORE and AMBER M. MOORE, paternal grandfather and step-grandmother, were appointed Guardians on 3/19/2013.	
Cont. from 111314, 010515, 022315, 032315		Father: JOSE ALFREDO FUENTEZ	<b>Continued from 3/23/2015.</b> Minute Order states examiner notes handed in open court; defects remain to be cured.
	Aff.Sub.Wit.		
✓	Verified	Paternal grandmother: Rebecca Fuentez; Declaration of Due Diligence filed 2/19/2015.	<b>Notes:</b> <ul style="list-style-type: none"> <li><b>Minute Order dated 2/23/2015</b> states Petitioner is to cure the defect regarding service to Jose Fuentez, father of the minor. The Court orders that the March visitation will begin on the 28<sup>th</sup> at noon and end on the 29<sup>th</sup> at noon and occur at the home of Jennifer Howell, as agreed to by the parties in open court.</li> <li><b>Probate Mediation Agreement</b> signed by Petitioners and Jennifer Howell was filed on 1/5/2015.</li> </ul>
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X Maternal grandfather: Shawn Howell; Declaration of Due Diligence filed 2/19/2015.	
	Aff.Mail	X Maternal grandmother: Karen Kinzel; Declaration of Due Diligence filed 2/19/2015.	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	<b>Petitioner states</b> the minor belongs with her mother and siblings. Petitioner states the guardianship was only to be temporary.	
	Conf. Screen		
	Letters		
	Duties/Supp	<b>Declaration containing a letter to the Court from Petitioner JENNIFER HOWELL was filed on 3/19/2015.</b>	
	Objections		
	Video Receipt		
✓	CI Report	Court Investigator's Report was filed 11/5/2014.	
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<b>The following issues from the last hearing remain:</b> 1. Need Notice of Hearing. 2. Need proof of service by mail of the Notice of Hearing with a copy of the <i>Petition for Termination of Guardianship</i> , or <i>Consent to Termination and Waiver of Notice</i> , or a <i>Declaration of Due Diligence</i> , for: <ul style="list-style-type: none"> <li>Martin Moore, Guardian;</li> <li>Amber Moore, Guardian;</li> <li>Jose A. Fuentez, father.</li> </ul>
			<b>Reviewed by:</b> LEG
			<b>Reviewed on:</b> 4/15/15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 10A – Fuentez</b>

Pro Per Moore, Martin (Pro Per Petitioner, Co-Guardian)  
 Pro Per Moore, Amber Michelle (Pro Per Petitioner, Co-Guardian)

## Petition to Fix Residence Outside the State of California

		<b>MARTIN E. MOORE</b> and <b>AMBER M. MOORE</b> , paternal grandfather and step-grandmother, Guardians appointed on 3/19/2013, are Petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>Continued from 3/23/2015.</u></b>
Cont. from 010515, 032315		Father: <b>JOSE ALFREDO FUENTEZ</b> ; personally served 2/1/2015.	<b>Note:</b> Probate Mediation Agreement signed by Petitioners and Jennifer Howell was filed on 1/5/2015.
<input type="checkbox"/>	Aff.Sub.Wit.	Mother: <b>JENNIFER HOWELL</b> ; personally served 11/13/2014 (for reference, Petition was filed 11/10/2014).	
<input checked="" type="checkbox"/>	Verified		<b>Note:</b> Petition is marked at Item 5(b) by Petitioners indicating that the minor will be returned to California by <b>8/13/2015</b> and this guardianship shall remain in full force and effect.
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Paternal grandmother: Rebecca Fuentez; Proof of Service by Mail filed 2/19/2015.	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Maternal grandfather: Shawn Howell; Proof of Service by Mail filed 2/19/2015.	
<input checked="" type="checkbox"/>	Aff.Mail	Maternal grandmother: Karen Kinzel; Proof of Service by Mail filed 2/19/2015.	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.	<b>Petitioners request</b> the Court authorize that the residence of the minor be fixed outside California to [physical address omitted] in <b>Minot, North Dakota</b> .	
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections	<b>Petitioners state</b> the reasons for the out-of-state move include that they could not find work that would provide for their family. Petitioners state Martin (Co-Petitioner) worked for 7 months in North Dakota without being with his family, and they moved there to be together as a family, as they felt it was the best they could do for everyone. Petitioners state Jennifer (mother) originally was in agreement with them moving, because she wanted to move to Oklahoma, but her plans didn't work out so she changed her mind. Petitioners state Martin is under contract until the end of July 2015, and that this move was not taken lightly as it was discussed and discussed for months before a decision was made. Petitioners state they believe it is best for all of them to be together as a family, and that Anastazia's father is there too.	
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			<b>Reviewed by:</b> LEG
			<b>Reviewed on:</b> 4/15/15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 10B - Fuentez</b>



Atty Docker, William F. (for Executor Carol Goulart)

## Second Report of Status of Administration of Estate (Probate Code §12200 et seq.)

<b>DOD: 8/24/12</b>			<b>CAROL GOULART</b> , Executor with Full IAEA without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
			I&A: \$1,850,310.00 consisting of various real property interests.	<b>CONTINUED TO 9/16/15</b> Per Attorney request
	<b>Aff.Sub.Wit.</b>		<p><b>Petitioner states</b> the estate is not yet in a position to close, but she has made significant progress toward that objective and she believes she will complete the tasks which will allow her to file a Petition for distribution in the near-term. The estate owns a 1/6 undivided interest in real property in Santa Clara, and the majority owners are negotiating a private sale of the property. Should the sale occur, the estate would be in possession of ample funds to pay the FTB claim and administration expenses to close the estate. If the property does not sell in the near-term, one of the co-owners is willing to advance funds to the estate for administrative expenses and debt and to treat the funds as an advance against the estate's share of the sale proceeds. Keeping the estate open in the near-term is not harmful to the estate or beneficiaries and Petitioner expenses to have completed tax returns and collected funds to pay delinquent tax within the next 90 days.</p> <p>Petitioner prays for an order that the administration of the estate continue for a period of three months after which time the petition either file a petition for distribution or subsequent status report.</p>	<p><b>Note:</b> Petitioner's original Report of Status filed 9/5/14 was recently heard on 3/12/15 and continued to 9/16/15. This Second Report of Status was filed on 3/4/15 and set this hearing.</p> <p><b>Note:</b> Petitioner requests three (3) months, but the proposed Order authorizes continuation of administration for six (6) months.</p>
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>			
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			

Reviewed by: skc

Reviewed on: 4/15/15

Updates: 4/17/15

Recommendation:

File 11 - Teixeira

<b>DOD: 05/17/2013</b>	<b>LOUISE BAKER</b> , was appointed Executor with full IAEA authority without bond on 01/27/2014.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Letters issued on 01/28/2014.	<b>Minute Order 4/2/15:</b> Counsel represents that there are no assets. Furthermore, his client is wheelchair bound and he did not direct her to utilize Court Call today. The Court admonishes that his client is subject to removal and/or surcharge. If the petition to close the estate is not filed, counsel and his client are both ordered to be present or appear via Court Call on 4/20/15.
<b>Cont. from 060614, 070114, 081915, 021915, 040215</b>	Minute Order of 01/06/2014 set this status hearing for the filing of the Inventory and Appraisal.	
<b>Aff.Sub.Wit.</b>	<b>Former Status Report filed 08/11/2014</b> states Attorney Calhoun failed to transfer over the hearing of 07/01/2014 due to a change in his calendaring. He and the executrix, Louise Baker, have done an extensive search and found that the estate has no property. However, on review of the events leading up to and during the investigation, it was determined that an individual had changed the beneficiary of the decedent's life insurance three days before her death. The case number of the probate has been used in discovery attempts to determine how such action was taken. As can be seen by the decedent's death certificate, Ms. Ello was in the hospital, and had been for over a month prior to her death. Therefore, with the changing of her beneficiary, it does not appear proper.	<b>As of 4/15/15, nothing further has been filed.</b>  <b>Page B is Status Re: Filing the First Account or Petition for Final Distribution.</b>  1. Need Inventory and Appraisal or petition to terminate proceedings.
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> LV / skc <b>Reviewed on:</b> 4/15/15 <b>Updates:</b> <b>Recommendation:</b> <b>File 12A - Ello</b>

<b>DOD: 5-17-13</b>	<b>LOUISE BAKER</b> , Mother, was appointed Executor with Full IAEA without bond on 1-27-14. Letters issued 1-28-14.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from 030615, 040215</b>	At hearing on 1-27-14, the Court set this status hearing for the filing of the first account or petition for final distribution.	<b>Minute Order 4/2/15:</b> Counsel represents that there are no assets. Furthermore, his client is wheelchair bound and he did not direct her to utilize Court Call today. The Court admonishes that his client is subject to removal and/or surcharge. If the petition to close the estate is not filed, counsel and his client are both ordered to be present or appear via Court Call on 4/20/15.
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		<b>2. Need petition to close insolvent estate. (Petition must be filed and set for noticed hearing, including notice to heirs and creditors per §11000.)</b>
<b>Inventory</b>		
<b>PTC</b>		<b>Note:</b> The original petition estimated the estate to contain personal property valued at \$500,000.00.
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		<b>Note:</b> Louise Baker is the sole heir pursuant to the decedent's will dated 12-21-84; however, Letters issued on 1-28-14 and two creditor's claims have been filed totaling \$1,983.54. The estate must be properly closed by noticed petition. See Probate Code §§ 10950 et seq., 11000, 12200.
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		<b>Reviewed by:</b> skc
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		<b>Reviewed on:</b> 4-15-15
<b>Conf. Screen</b>		
<b>Letters</b>		<b>Updates:</b> 4-17-17
<b>Duties/Supp</b>		
<b>Objections</b>		<b>Recommendation:</b>
<b>Video Receipt</b>		
<b>CI Report</b>		<b>File 12B - Ello</b>
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

**Report of Status and Request for Extension of Time to Close the Estate filed 4/17/15 states** the decedent, knowing she was going to die, gave away her personal property and spent her last known money on her treatment. The executor had talked with the decedent a few weeks prior to her death and had been informed of a life insurance policy with a value of \$500,000.00; however, the policy amounts never materialized in the estate. The Executor is only aware of one creditor's claim and is checking the file to ascertain the second one. Petitioner's attorney advanced \$785.00 on behalf of the estate for filing fees as set forth on Exhibit B.

Petitioner prays that the Report of Status be approved; that the time for administering the estate be closed; and that Petitioner be allowed to close out the estate.

Pro Per Arellano, III, Jaime Gabriel (Pro Per Petitioner, father)  
 Pro Per Gomez, Adelita (Pro Per Guardian, paternal grandmother)

## Petition for Termination of Guardianship

		<b>JAIME GABRIEL ARELLANO, III</b> , father, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b> <b>Continued from 3/2/2015.</b> Minute Order states examiner notes are provided to the Petitioner. Parties are directed to provide their contact information to the Court. Matter is continued to 4/20/2015 for the Petitioner to cure the defects noted in the examiner notes.
		<b>ADELITA GOMEZ</b> , paternal grandmother, was appointed Guardian on 7/15/2014.—Proof of personal service (served on 2/10/2015) was filed 2/25/2015.	
<b>Cont. from 030215</b>		Mother: <b>CARA STEARNS</b> ; personally served 4/12/2015.	1. Need proof of service by mail of the Notice of Hearing with a copy of the Petition for Termination of Guardianship, or Consent to Termination and Waiver of Notice, or a Declaration of Due Diligence, for: <ul style="list-style-type: none"> <li>• Evanee Marie Arellano, sibling, if age 12 or over;</li> <li>• Johnathon Stearns, sibling, if age 12 or over;</li> <li>• Zoe Stearns, sibling, if age 12 or over;</li> <li>• Maternal grandparents.</li> </ul> <b>Note:</b> Proof of Personal Service filed 4/14/2015 shows the following persons whose relationships are unstated have been served with notice: <ul style="list-style-type: none"> <li>• <b>Reyna Brewd</b> (sp.), served 4/11/2015;</li> <li>• <b>Raquel Vue</b>, served 4/11/2015;</li> <li>• <b>Rosario Garcia</b>, served 4/12/2015.</li> </ul>
✓	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg	Paternal grandfather: Jaime Arellano Acosta; personally served 4/12/2015.	
	Aff.Mail		
	Aff.Pub.	Maternal grandfather: Unknown	
	Sp.Ntc.	Maternal grandmother: Unknown	
✓	Pers.Serv.	W/	
	Conf. Screen	~Please see Petition for details~	
	Letters		
	Duties/Supp		
	Objections	Court Investigator's Report was filed 4/10/2015.	
	Video Receipt		
✓	CI Report	Declaration of Petitioner filed on 4/17/2015.	
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<b>Reviewed by:</b> LEG
			<b>Reviewed on:</b> 4/15/15
			<b>Updates:</b> 4/17/15
			<b>Recommendation:</b>
			<b>File 13 - Stearnes</b>

<b>DOD: 12-20-13</b>		<b>JOANN DIREDO</b> , Daughter, was appointed Executor with Full IAEA without bond on 7-10-14. Letters issued 7-16-14.  At the hearing on 7-10-14, the Court set this status hearing re: filing of the Inventory and Appraisal.  <b>Status Report filed 12-31-14 states</b> they have recently become aware of a matter of confusion regarding the real property of the estate. Time is needed to research the entities of ownership and the amount of each entities' ownership, and perhaps supplement or correct the final I&A. There is also an issue of rejection of certain creditor claims. They will be ordering a title search on one parcel. Attorney Fanucchi failed to appear for the 12-11-14 hearing because the hearing was not placed on his calendar pursuant to the 7-8-14 Examiner Notes, and the Executrix was not advised of the said date of hearing.  <b>Status Report filed 2-9-15 states</b> counsel obtained a Guarantee of the Chain of Title from Chicago Title Company issued 1-9-15 containing 107 pages. It appears there are questions concerning the exact title owned as to a certain property on Shaw Ave., because of multiple transfers since 1978. Additional time is needed to determine ownership and perhaps request supplement or correction to the Final Inventory and Appraisal. The Executrix has been served with three creditor's claims. Mr. Fanucchi will appear on 2-23-15 and request continuance.  <b>Status Report filed 4-16-15 states</b> the attorney had surgery and is convalescing and it is anticipated that he will not be back in the office for at least four weeks. David Moeck will appear for the 4-20-15 hearing to request continuance, but is not familiar enough with the file or client to render the necessary argument or complete the I&A for filing. David DiRedo has filed a Complaint for Breach of Contract, Money had and Received, Declaratory Relief which was served 4-7-15 in regard to his creditor's Claim filed in the estate, which has been rejected.
<b>Cont from 121114, 010515, 022315</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Minute Order 2-23-15:</b> Counsel represents that there are three creditor's claims that need to be resolved before the Inventory and Appraisal can be filed.
<b>Note:</b> Three Rejections of Creditor's Claims were filed 3-13-15; however, no Inventory and Appraisal has been filed as of 4-15-15. In addition, a fourth creditor's claim was filed on 2-19-15.
1. Need Inventory and Appraisal per Probate Code §8800.
2. A request for Special Notice has been filed by the IRS. The Court may require Notice of Hearing with a copy of any status report to be served on the IRS and all interested parties pursuant to Probate Code §1252.
<b>Note:</b> The original petition estimated the estate value at \$1,000,000.00.
<b>Note:</b> As of 4-15-15, four (4) Creditor's Claims have been filed in this matter, including a claim by the IRS in the amount of \$5,805.17 and a claim by a family member in the amount of \$106,866.46.
<b>Reviewed by:</b> skc
<b>Reviewed on:</b> 4-15-15
<b>Updates:</b> 4-17-15
<b>Recommendation:</b>
<b>File 14 – DiRedo</b>

Pro Per Shirey, Amber Dawn (Pro Per Petitioner, mother)  
 Pro Per Flores, Christina Renee (Pro Per Guardian, non-relative)

## Petition for Visitation

			<b>AMBER DAWN SHIREY</b> , mother, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 3/2/2015.</b> Minute Order states matter is continued to 4/20/2015 for notice to be provided as required. [Note: All notice defects have been cured.]
			<b>CHRISTINA RENEE FLORES</b> , non-relative (girlfriend of the children's paternal uncle, <b>JACK CARSON</b> ), was appointed Guardian on 10/16/2014. Guardian was served notice by mail 3/25/2015.	
Cont. from 030215				
	Aff.Sub.Wit.			
✓	Verified		Father: <b>STEVEN DALE FOLSOM</b> ; served notice by mail 3/25/2015.	
	Inventory			
	PTC		Paternal Grandfather: Chester Folsom; served notice by mail 3/25/2015.	
	Not.Cred.		Paternal Grandmother: Julie Carson; served notice by mail 3/25/2015.	
✓	Notice of Hrg		Maternal Grandfather: Donnie Shirey; served notice by mail 3/25/2015.	
✓	Aff.Mail	W/	Maternal Grandmother: Sharon Shirey; served notice by mail 3/25/2015.	
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
✓	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order	X		
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

~Please see Petition for details~

**Response to Petition for Visitation** filed by **CHRISTINA FLORES**, Guardian, on 4/15/2015.

Reviewed by: LEG
Reviewed on: 4/16/15
Updates:
Recommendation:
File 15 - Folsom

Atty O'Malley, David T (for Craig R. Hansen – Executor)

## Probate Status Hearing re: Filing of the Inventory and Appraisal

Cont. from		
	Aff.Sub.Wit.	
	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

**NEEDS/PROBLEMS/COMMENTS:**

**OFF CALENDAR.**  
**Final Inventory and Appraisal was filed 12/29/2014.**

<b>Reviewed by:</b> LV
<b>Reviewed on:</b> 04/15/2015
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 16 - Hansen</b>

Attorney Markeson, Thomas A. (for Petitioner Richard Harris)

(1) First and Final Report; (2) Petition for Approval of First and Final Report on Waiver of Account and for  
 (3) Final Distribution

<b>DOD: 9/21/14</b>	<b>RICHARD HARRIS</b> , Executor, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Accounting is waived.	
<b>Cont. from</b>	I & A - <b>\$717,000.00</b>	
	POH - <b>\$673,415.75</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Executor - <b>waives</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Attorney - <b>\$17,140.00</b> (statutory; to be paid outside of the estate)	
<input checked="" type="checkbox"/> <b>Inventory</b>	<b>Distribution, pursuant to Decedent's Will, is to:</b>	
<input checked="" type="checkbox"/> <b>PTC</b>	<b>Diana Nordstrom</b> - \$70,206.37, ½ interest in real and personal property and 6.25% of Vista Del Monte Limited Partnership.	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	<b>Richard Harris</b> - \$70,206.37, ½ interest in real and personal property and 6.25% of Vista Del Monte Limited Partnership.	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b> W/		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 4/16/15</b>
		<b>Updates:</b>
		<b>Recommendation: SUBMITTED</b>
		<b>File 17 - Harris</b>



		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Continued from 3-2-15. As of 4-15-15, nothing further has been filed. The following issues remain:  1. Need Notice of Hearing.  2. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Jolean Grimaldo (Mother) - Father of minor  3. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Maternal Grandfather Joe Aragon - Maternal Grandmother Cindy Aragon - Paternal Grandfather - Paternal Grandmother - Siblings age 12 or older: Joshua, Jaylynn, Jordan, and Erin  4. Petitioner's Request to Waive Court Fees was denied on 1-5-15. Therefore, need filing fees of \$285.00 for the temporary and general guardianship petitions.	
Cont 030215				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			x
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: skc Reviewed on: 4-15-15 Updates: Recommendation: File 18 - Bachant				

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 8 mos.		<b><u>TEMPORARY EXPIRES 04/20/15</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>ANNETTE IVORY</b> , non-relative, is Petitioner.		<b><u>CONTINUED FROM 03/09/15</u></b>	
		Father: <b>LEONELL MONARES</b> – <i>Personally served on 03/11/15</i>		1. Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:	
<b>Cont. from 030915</b>		Mother: <b>E'VAHNAVA WILLIAMS</b> – <i>Consent &amp; Waiver of Notice filed 01/05/15; Personally served on 03/11/15</i>		a. Paternal grandparents – service by mail sufficient	
<input type="checkbox"/>	Aff.Sub.Wit.			b. Maternal grandfather – service by mail sufficient	
✓	Verified			<b>Note:</b> Proof of service filed 03/23/15 indicates that Margo Monares was served by mail on 03/11/15; however her relationship to the minor is unknown	
	Inventory				
	PTC				
	Not.Cred.				
✓	Notice of Hrg				
✓	Aff.Mail	w/			
	Aff.Pub.				
	Sp.Ntc.				
✓	Pers.Serv.	w/			
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
✓	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
				<b>Reviewed by:</b> JF	
				<b>Reviewed on:</b> 04/15/15	
				<b>Updates:</b>	
				<b>Recommendation:</b>	
				<b>File 19 - Monares</b>	

## Petition for Appointment of Guardian of the Person (Prob. C. 1510)

			See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Minute Order 3/23/15 states Rosalee Bradshaw, paternal grandmother, needs to be properly served.  Notice of Hearing filed 3/27/15 indicates service mailed to Ms. Bradshaw on 3/26/15.
Cont from 032315				
	Aff.Sub.Wit.			
	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4/15/15	
			Updates:	
			Recommendation:	
			File 20 - Thomas	

**Petition for Probate for Letters of Administration**

<b>DOD: 12/11/2014</b>	<b>JON LEE CASON</b> , son, is Petitioner and requests appointment as Administrator without bond.		<b>NEEDS/PROBLEMS/COMMENTS:</b> <b>Continued 3/2/2015.</b> Minute Order states the Petitioner is provided a copy of the examiner notes and directed to cure the defects. The Petitioner is advised that the Court will require a bond to be set at some point in time.  <b>Note:</b> Caption of the <i>Petition</i> does not request IAEA authority; however, Item 2(c) of the <i>Petition</i> requests full IAEA authority. Therefore, the <i>Petition</i> has been reviewed as if Petitioner seeks <u>full IAEA authority</u> to administer this estate.  <b>The following issues from the last hearing remain:</b> <ol style="list-style-type: none"> <li>Item 2(d)(1) of the <i>Petition</i> states that Petitioner requests bond not be required without stating a reason for the request by marking a selection in Item 3(d) of the <i>Petition</i>.</li> <li>Need Notice of <i>Petition to Administer Estate</i> and proof of mailed notice pursuant to Probate Code § 8110 for the following person: <ul style="list-style-type: none"> <li>Daren Joseph Cason, [relationship unspecified in Item 8 of the <i>Petition</i>].</li> </ul> </li> <li>Need Affidavit of Publication pursuant to Probate Code §§ 8120 – 8124, and Local Rule 7.9.</li> <li>Item 3(c)(5) of the <i>Petition</i> should but does not provide an estimate of the encumbrances on the real property, rather than stating “unknown” encumbrances, in order for the Court to determine the amount of bond that may be fixed.  ~Please see additional page~ </li> </ol>
	Full IAEA — ? (Need publication)		
<b>Cont. from</b>	Decedent died intestate?		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	<b>OR</b>		
<input checked="" type="checkbox"/> <b>Verified</b>	Will dated 1/13/2008?		
<input type="checkbox"/> <b>Inventory</b>	Residence — Fresno		
<input type="checkbox"/> <b>PTC</b>	Publication — <b>Need</b>		
<input type="checkbox"/> <b>Not.Cred.</b>	<b>Estimated value of the Estate:</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>	Personal property - <b>\$150,000.00</b>		
<input type="checkbox"/> <b>Aff.Mail</b>	<u>Real property</u> - <b>\$ unknown</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>	<b>Total</b> - ?		
<input type="checkbox"/> <b>Sp.Ntc.</b>	Probate Referee: <b>Rick Smith</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>			
<input type="checkbox"/> <b>Conf. Screen</b>			
<input checked="" type="checkbox"/> <b>Letters</b>			
<input checked="" type="checkbox"/> <b>Duties/Supp</b>			
<input type="checkbox"/> <b>Objections</b>			
<input type="checkbox"/> <b>Video Receipt</b>			
<input type="checkbox"/> <b>CI Report</b>			
<input type="checkbox"/> <b>9202</b>			
<input checked="" type="checkbox"/> <b>Order</b>			
<input type="checkbox"/> <b>Aff. Posting</b>			
<input type="checkbox"/> <b>Status Rpt</b>			
<input type="checkbox"/> <b>UCCJEA</b>			
<input type="checkbox"/> <b>Citation</b>			
<input type="checkbox"/> <b>FTB Notice</b>			

5. Item 3(e) of the *Petition* is marked both at item (e)(1) stating Decedent died intestate, and at item (e)(2) stating a copy of Decedent's handwritten Will dated 1/13/2008 is attached. The following deficiencies must be cured, as applicable:
  - Need the original of Decedent's handwritten Will to be deposited with the Court;
  - Need a copy of Decedent's handwritten Will to be attached to the *Petition*;
  - Need typewritten copy of Decedent's handwritten Will to be attached to the *Petition*;
  - If Decedent had a handwritten Will that can be proved sufficiently for the Court to admit the Will to probate as a holographic Will, the *Petition* must be amended to request appointment as Administrator with Will Annexed, based upon the marking of Item f(1)(b) stating that no executor is named in the Will.
6. **Item 5(a) of the *Petition* is incomplete as to (3) or (4) re: registered domestic partner, and (7) or (8) re: issue of a predeceased child.**
7. **Item 8 of the *Petition* does not state the relationship to Decedent of DAREN JOSEPH CASON.**

Atty Hernandez, Margaret (Pro Per – Petitioner – Paternal Grandmother)

Atty Miller, Carmen (Pro Per – Objector – Mother)

## Petition for Appointment of Guardian of the Person

			<p><u>Please see petition for details</u></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Andrew P. Fuentes, Jr. (Father)</li> <li>• Camie Miller (Mother)</li> </ul> </li> <li>3. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Andrew P. Fuentes (Paternal Grandfather)- Unless the Court dispenses with notice.</li> </ul> <p><b>Note:</b> Declaration of Due Diligence is incomplete.</p> <ul style="list-style-type: none"> <li>• Maternal Grandmother (Not Listed)</li> </ul> </li> <li>4. UCCJEA is incomplete. Need minor's residence information for the past 5 years.</li> </ol>
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg	x		
	Aff.Mail	x		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	x		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			<p><b>Reviewed by:</b> LV</p>	
			<p><b>Reviewed on:</b> 04/15/2015</p>	
			<p><b>Updates:</b></p>	
			<p><b>Recommendation:</b></p>	
			<p><b>File 22 - Fuentes</b></p>	

Atty Howell, Angelette V. (Pro Per Petitioner)

## Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		See petition for details	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. The relatives were served Notice of Hearing without a copy of the petition as required by Probate Code §1511. The Court may require further service.  2. Need proof of service of Notice of Hearing with a copy of the petition pursuant to Probate Code §1511 on the following relatives whose addresses were unknown per the Notice of Hearing filed 3/12/15: - Andrew Cortes (Maternal Grandfather) - Vanessa Alba (Sibling, if age 12 or older)
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail w/o		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	DSS Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4/16/15
			Updates: 4/17/15
			Recommendation:
			File 23A – Alba

Attorney Dowling, Michael P (for Petitioner Robert Sheakalee)

## Petition for Order Accepting Resignation of Trustee and for Appointment of Successor Trustee; for Order Approving Trustee's Account and Report; and for Discharge of Trustee's Bond

		<b>ROBERT SHEAKALEE</b> , Trustee, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note:</b> Generally the fiduciary bond is not released until a receipt of distribution is received by the Successor Trustee.
		Petitioner states he is the duly appointed and acting Trustee of the <b>DONNA SILVA BUNCE TRUST</b> , established under the <b>Donna I. Silva Revocable Family Trust</b> .	
Cont. from		Petitioner was appointed successor trustee by order of this Court dated 5/1/13 (in the Donna I. Silva Revocable Family Trust, case no. 13CEPR00131). Petitioner states he no longer has the time necessary to devote to his duties as Trustee and believes it is best that he resign.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Petitioner is bonded in the amount of \$300,000.00 and wishes to be discharged of his bond upon approval of this petition by the Court.  The Trust does not contain a provision allowing the currently serving trustee to appoint his successor. Petitioner does not believe that beneficiary, <b>DONNA S. BUNCE</b> will participate in the nomination of a successor.  <b>FRESNO COUNTY PUBLIC GUARDIAN</b> has agreed to serve as successor Trustee.  Petitioner has not taken a fee as Trustee and does not intend to take a fee for his services as Trustee.  Petitioner has filed a fiduciary income tax return for 2013 and is in the process of filing a fiduciary return for 2014 and paid the taxes due.  Petitioner hereby incorporates the accounting of his acts as Trustee.  <b>Please see additional page</b>			
<b>Reviewed by: KT</b> <b>Reviewed on: 4/16/15</b> <b>Updates:</b> <b>Recommendation:</b> <b>File 24 - Bunce</b>			



Account period: 5/1/2013 – 12/31/2014

Accounting	-	\$295,067.49
Beginning POH	-	\$133,055.98
Ending POH	-	\$275,506.13

Petitioner requests the court authorize him to retain a reserve of \$25,000.00 from which to pay any taxes or expenses of administration, including attorney and accountant fees after the closing of the account period and pending transfer of the assets of the Trust to the successor Trustee.

**Wherefore Petitioner prays for an Order of this Court that:**

1. The Court order the **FRESNO COUNTY PUBLIC GUARDIAN** be appointed successor Trustee of the Donna Silva Trust;
2. The Court direct Petitioner to distribute the remaining trust assets, after payment of attorney's fees and costs, to the **FRESNO COUNTY PUBLIC GUARDIAN** as successor trustee;
3. The court discharge **ALBERT SHEAKALEE** from his bond with Great American Insurance Company Co.;
4. The Court approve the accounting of Petitioner's acts as Trustee from May 1, 2013 through 12/31/14, including a reserve of \$25,000.00

Atty Lucich, Nicholas L, JR (for Frances Levine – Petitioner – Spouse)

**Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

<b>DOD: 02/14/2015</b>		<b>FRANCES LEVINE</b> , spouse/named Executor without bond, is petitioner.  Full IEAE – o.k.  Will dated 08/26/2005  Residence: Fresno Publication: The Business Journal  <u><b>Estimated value of the Estate:</b></u> Real property - \$250,000.00  Probate Referee: Steven Diebert	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>Note:</b></u> If the petition is granted status hearings will be set as follows:  • <b>Monday, 08/24/2015 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u>  • <b>Monday, 06/20/2016 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.  Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.	
<b>Cont. from</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			s/p
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>			w/
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>			
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			

<b>Reviewed by:</b> LV
<b>Reviewed on:</b> 04/15/2015
<b>Updates:</b>
<b>Recommendation:</b> Submitted
<b>File</b>

NEEDS/PROBLEMS/COMMENTS:

Attorney

Istanboulia, Flora

**Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA  
(Prob. C. 8002, 10450)**

<b>DOD:2/15/15</b>		<p><b>JOY ELAINE JOHNSON</b>, Daughter and named Executor without bond, is Petitioner.</p> <p>Full IAEA – ok</p> <p>Will dated 7/30/97</p> <p>Residence: Fresno Publication: Business Journal</p> <p>Estimated value of estate: Annual income: \$18,000.00 Real property: \$175,000.00 Total: \$193,000.00</p> <p>Probate Referee: Rick Smith</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Note:</u> If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li>• <b>Monday, 08/24/2015 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u></li> <li>• <b>Monday, 06/20/2016 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>	
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>			w
✓	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
✓	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 4/16/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b> SUBMITTED</p> <p><b>File 27 - Blasingame</b></p>				

**28 Sally Munoz (CONS/P)**

Case No. 15CEPR00239

Petitioner

Valdivia, Sylvia

Petition

Petition for Appointment of Probate Conservator of  
the Person (Prob. C. 1820, 1821, 2680-2682)

<b>Age:</b>			<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>OFF CALENDAR</u></b>  Request for Dismissal filed.		
<b>DOD:</b>					
<b>Cont. from</b>					
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>				
<input type="checkbox"/>	<b>Verified</b>				
<input type="checkbox"/>	<b>Inventory</b>				
<input type="checkbox"/>	<b>PTC</b>				
<input type="checkbox"/>	<b>Not.Cred.</b>				
<input type="checkbox"/>	<b>Notice of Hrg</b>				
<input type="checkbox"/>	<b>Aff.Mail</b>				
<input type="checkbox"/>	<b>Aff.Pub.</b>				
<input type="checkbox"/>	<b>Sp.Ntc.</b>				
<input type="checkbox"/>	<b>Pers.Serv.</b>				
<input type="checkbox"/>	<b>Conf. Screen</b>				
<input type="checkbox"/>	<b>Letters</b>				
<input type="checkbox"/>	<b>Duties/Supp</b>				
<input type="checkbox"/>	<b>Objections</b>				
<input type="checkbox"/>	<b>Video Receipt</b>				
<input type="checkbox"/>	<b>CI Report</b>				
<input type="checkbox"/>	<b>9202</b>				
<input type="checkbox"/>	<b>Order</b>				
<input type="checkbox"/>	<b>Aff. Posting</b>				
<input type="checkbox"/>	<b>Status Rpt</b>				
<input type="checkbox"/>	<b>UCCJEA</b>				
<input type="checkbox"/>	<b>Citation</b>				
<input type="checkbox"/>	<b>FTB Notice</b>				
				<b>Reviewed by:</b> skc	
				<b>Reviewed on:</b> 4/16/15	
			<b>Updates:</b>		
			<b>Recommendation:</b>		
			<b>File 28 - Munoz</b>		

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Continued from 4/13/15. Nothing further has been filed. The following issues remain:  1. Need Notice of Hearing.  2. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing pursuant to Probate Code §2250(e) <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Alejandro Ochoa Huitron (Father) - Ora Marie Huitron (Mother)	
Cont from 041315				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			x
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4/15/15	
			Updates:	
			Recommendation:	
			File 29 - Cruz	

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Age: 6		<b>GENERAL HEARING: 06/03/15</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		ROSEMARY GALLEGOS and BENJAMIN GALLEGOS, maternal grandmother and step-grandfather, are Petitioners.		<b>CONTINUED FROM 04/13/15</b>	
		Father: <b>KENNETH LOFTIS</b> – Served by mail on 04/02/15; Declaration of Due Diligence filed 04/15/15  Mother: <b>SELINA RAMIREZ</b> – Consent & Waiver of Notice filed 04/01/15  Paternal grandfather: ARNOLD LOFTIS – Served by mail on 04/02/15  Paternal grandmother: DAISY LOFTIS – Served by mail on 04/02/15  Maternal grandfather: DECEASED  Siblings: MARCUS RAMIREZ  <b>Petitioners state</b> [see Petition for Details].  <b>Declaration of Susan A. Hemb, Attorney for Petitioners in Support if Petition for Appointment of Guardian</b> filed 04/15/15 states: [see File for Details].			
Cont. from 041315					
	Aff.Sub.Wit.				
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
✓	Notice of Hrg				
✓	Aff.Mail	w/			
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.	x			
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
				Reviewed by: JF Reviewed on: 04/15/15 Updates: Recommendation: File 30 - Loftis	